

For many agencies, insurance automation is moving from a long-term initiative to a near-term priority. This first edition marks the start of a regular update on the developments, conversations, and ideas shaping insurance automation.

This Year at a Glance

2 new partnerships putting vBots in front of more agencies nationwide

14 custom intelligent assistants built for agency-specific workflows

5 industry events this year, with 3 more stops before the year wraps up

A webinar hosted with HUG, a second lined up with Catalyit, and more to follow

A New Way to Keep Up With vBots

This is the first edition of what will be a regular update from vBots, covering our work, our partnerships, and where we are headed next. Here's the story so far.

vBots began in 2019, built to automate the high-volume, rule-based work that eats into agency teams' time. Seven years later, here is where things stand:



100+

Clients across North America



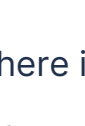
\$3M

In yearly savings for clients



10K+

Hours returned to staff each month



100,000+

Transactions processed monthly

Every intelligent assistant runs on the same foundation regardless of client:

- Intelligent automation paired with AI where interpretation is genuinely needed
- Human-in-the-loop design for high-stakes decisions
- Full execution logging
- Daily error reporting
- Data that never leaves the client's own network

New Partnerships

Expanding Our Industry Presence

vBots expanded its footprint across the independent agency ecosystem this year:



Agents Council for Technology (ACT):

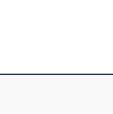
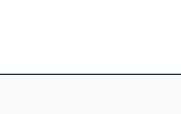
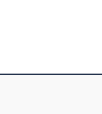
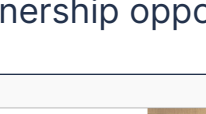
vBots joined ACT as a supporting partner, a program of the Big "I" (Independent Insurance Agents & Brokers of America). The partnership puts vBots in direct conversation with the independent agency channel nationwide.



Catalyit:

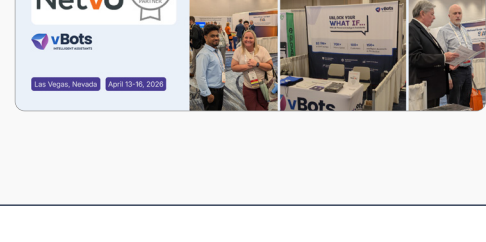
vBots joined as a Premium Solution Provider this year, listed under the AI and Automation category.

Continued Partnerships



How vBots is Shaping Industry Conversations

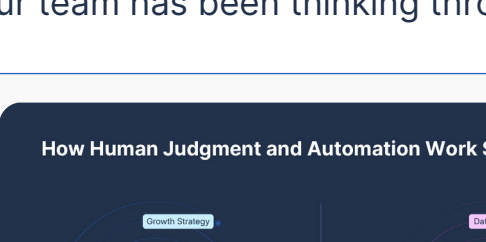
In Q1 2026, we participated in two key industry events, HUG 2026 in Dallas and Accelerate 2026 in Las Vegas. Both events were highly successful, enabling us to build new relationships with prospective customers and explore promising partnership opportunities.



HUG 2026 Recap - The #1 question agencies asked: How to measure automation ROI?

vBots was at the 2026 HUG National Conference. Read what agencies wanted to know about AI insurance automation, ROI, and finding the right solution provider.

[Read More](#)



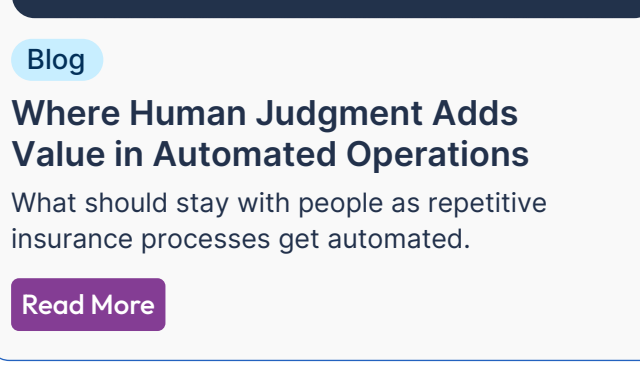
Accelerate 2026 Recap - Everything We Heard and Showcased

vBots was at the Accelerate 2026 event. Discover what agencies wanted to know about insurance automation, ROI, and finding the right starting point.

[Read More](#)

Resources to Explore

A few recent reads from the vBots blog, covering parts of agency operations our team has been thinking through this month.

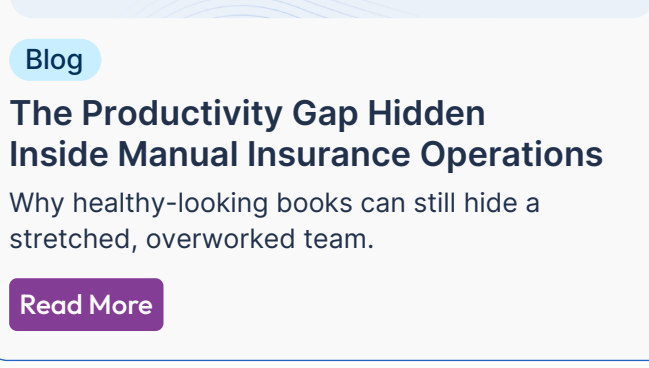


Blog

Where Human Judgment Adds Value in Automated Operations

What should stay with people as repetitive insurance processes get automated.

[Read More](#)

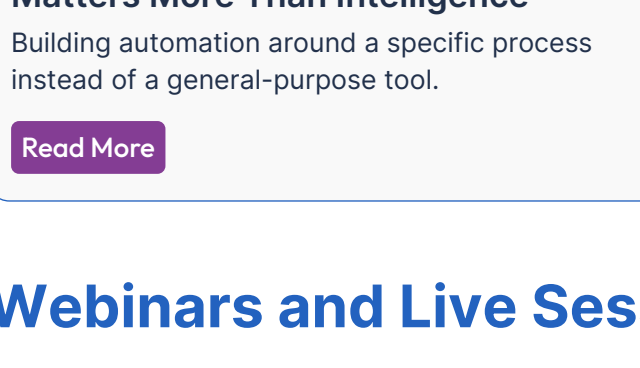


Blog

The Productivity Gap Hidden Inside Manual Insurance Operations

Why healthy-looking books can still hide a stretched, overworked team.

[Read More](#)

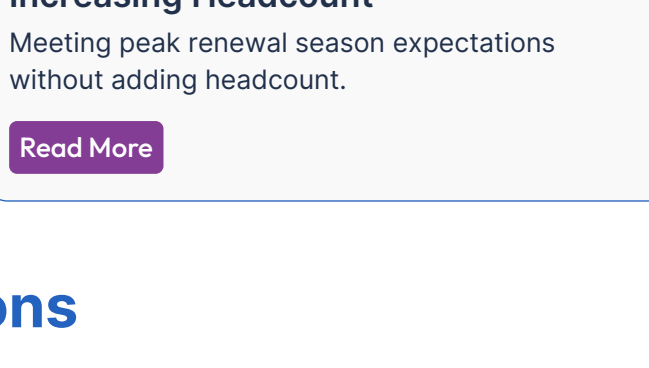


Blog

Workflow-First AI: Why Purpose Matters More Than Intelligence

Building automation around a specific process instead of a general-purpose tool.

[Read More](#)



Guide

Scaling Renewal Capacity Without Increasing Headcount

Meeting peak renewal season expectations without adding headcount.

[Read More](#)

Webinars and Live Sessions

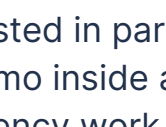
Live sessions covering the practical side of insurance agency automation: where to start, what to prioritize, and what the process actually looks like once it's running.

Upcoming Webinar

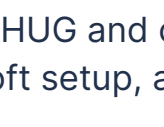
Insurance Agency Process Automation: Where and How to Start



Speakers



Raul Guerra
Director of Sales



Moe Elkateb
VP - Insurance Automation Solutions

September 17, 2026

Hosted in partnership with Catalyit

[Register Now!](#)

Past Webinar

Our most recent session, Run Your Agency Operations with Intelligent Assistants, was hosted in partnership with HUG and covered a HawkSoft agency case study, a live demo inside a real HawkSoft setup, and a look at offshore VAs versus automation for agency work.

[Watch the recording here.](#)

Next Steps on the vBots Roadshow

Live demos, real case studies, and ROI estimate if you bring your volume numbers. Here's where to find the vBots team this fall.

BIG I | ILLINOIS

Big I Illinois CONVO
Peoria Civic Center, Peoria, IL
October 14-16, 2026

AMERICAN AGENTS ALLIANCE

American Agents Alliance
Palm Desert, CA
September 24-26, 2026

ITC VEGAS

ITC Vegas
Mandalay Bay, Las Vegas
Sep 29 - Oct 1, 2026

Catch Us on the Road

Continue the Conversation With vBots

This issue covered how agencies are applying automation, the solutions vBots has built, and the industry conversations shaping what comes next. If any of it reflects your agency's priorities, schedule a conversation with our team. We will help you identify a practical starting point based on your systems, processes, and workload.

[Talk to our team!](#)

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Certifications & Compliance

